

Purpose

Use this procedure to enroll a new hire with dependents into their desired benefit plans.

Prerequisites

- New Hire action has been performed
- New Hire has completed and signed all necessary enrollment forms.
- New Hire has dependents to add to enrollment plan.

Menu Path

Use the following menu path(s) to begin this transaction:

- **PA30** - Human Resources → Personnel Management → Administration → HR Master Data
→ PA30-Maintain
- **HRBEN0001** - Human Resources → Personnel Management → Benefits
→ HRBEN0001-Enrollment

Transaction Code

PA30/HRBEN0001

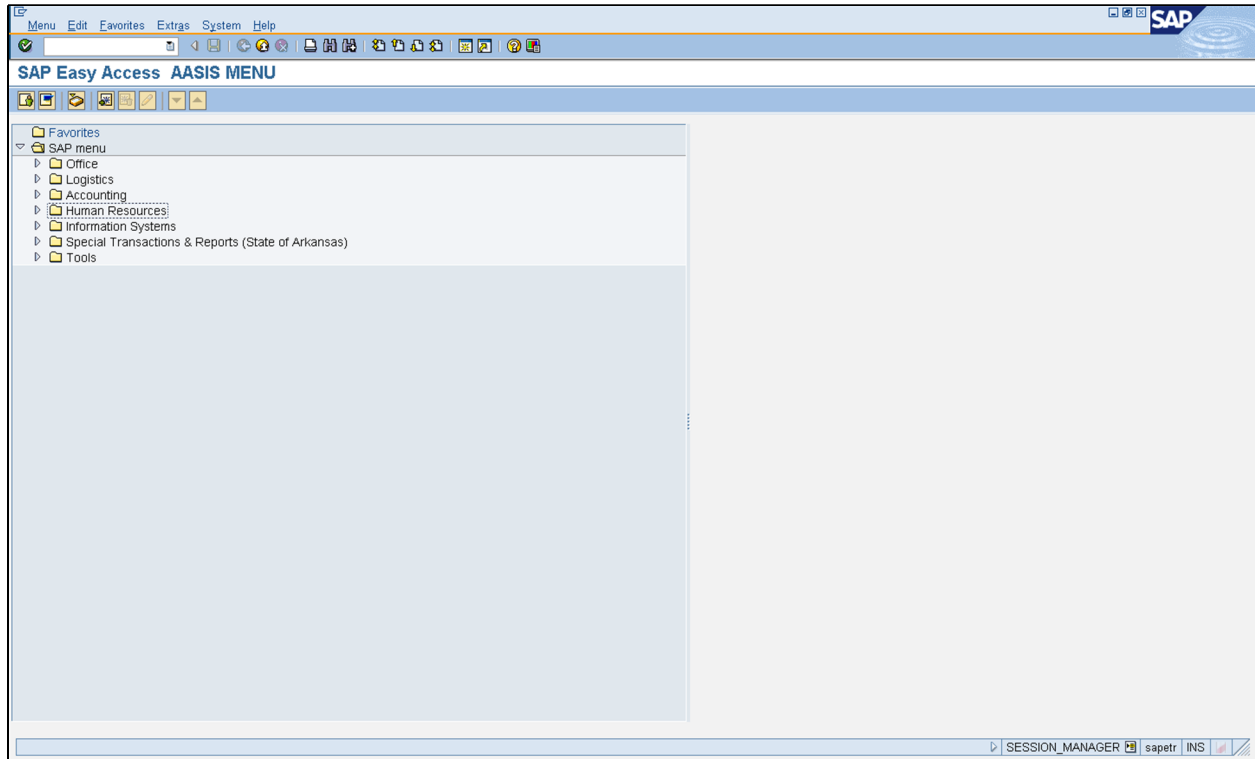
Tips and Tricks

- The Adjustment Reason for New Hire Enrollment (IT0378) is automatically created after the Hire action (PA40) is processed.
- The Adjustment Reason for New Hire Enrollment (IT0378) start date will be the same as the employee's hire date.

Procedure

1. Start the transaction using the menu path or transaction code.

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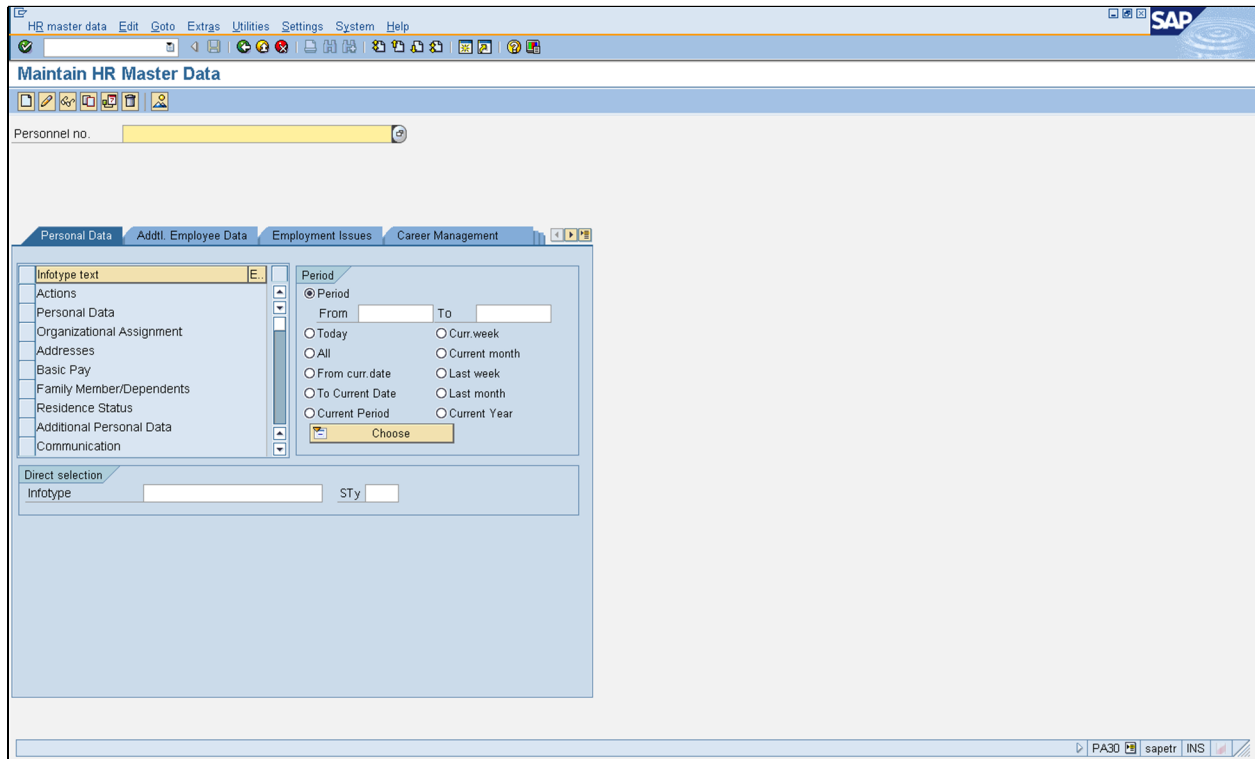


2. As required, complete/review the following fields:

| Field | R/O/C | Description |
|---------------|----------|---|
| Command Field | Required | Enter Maintain HR Master Data transaction Example: PA30 |

3. Click Enter .

Maintain HR Master Data



4. As required, complete/review the following fields:

| Field | R/O/C | Description |
|---------------|----------|---|
| Personnel no. | Required | Enter the New Hire's personnel number. Example: 2802 |

5. Click Enter .


6. Select **Family Member/Dependents** .

7. Click Create .

Subtypes for infotype "Family Member/Dependents" (1) 17 Entries found

Subtypes for infotype "Family Member/Dependents" (1) 17 Entries found

Restrictions

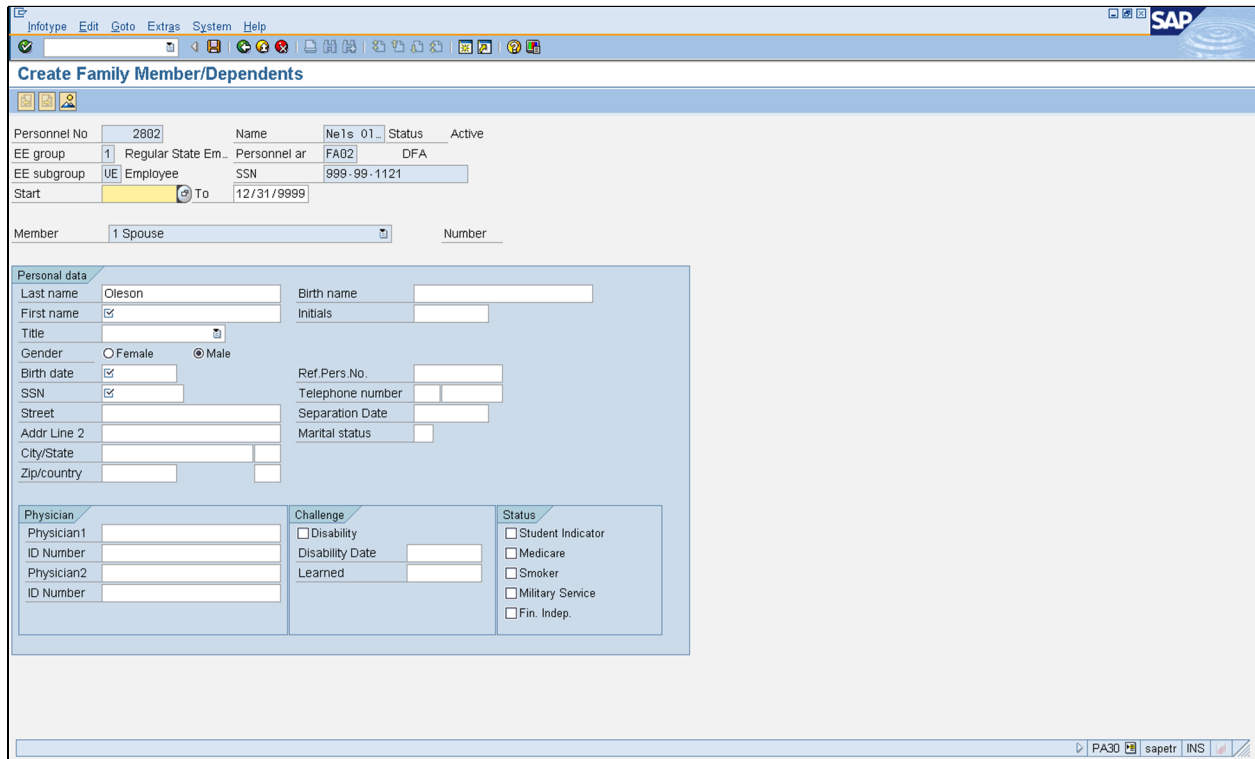


| STyp | Name |
|------|--------------------------|
| 1 | Spouse |
| 10 | Divorced spouse |
| 11 | Father |
| 12 | Mother |
| 13 | Domestic partner |
| 14 | Domestic partner's child |
| 15 | Newborn |
| 16 | Stepson |
| 17 | Stepdaughter |
| 2 | Child |
| 3 | Court Appointed |
| 4 | Adopted Child |
| 5 | Guardian |
| 6 | Stepchild |
| 7 | Emergency contact |
| 8 | Related persons |
| 9 | Other |

17 Entries found

8. Double-click type of dependent to be added to the employee's benefits.

Create Family Member/Dependents

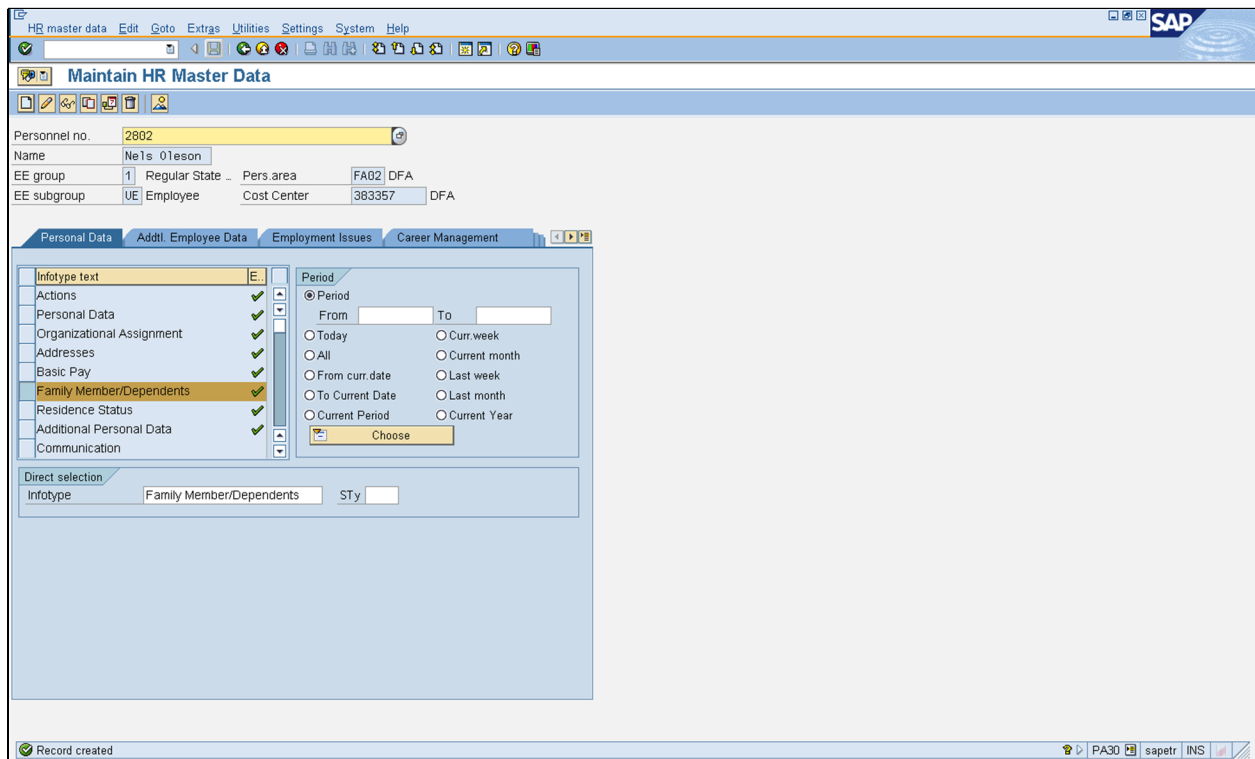


9. As required, complete/review the following fields:

| Field | R/O/C | Description |
|------------|----------|--|
| Start | Required | Enter the 1st of the month in which benefits will be effective. Example: 08/01/2010 |
| First name | Required | Enter the dependent's first name. Note: If the dependent's last name is different from the employee's last name, delete and enter the correct last name. Example: Harriet |
| Birth date | Required | Enter the dependent's date of birth. Example: 11/04/55 |
| SSN | Required | Enter the dependent's social security number. Example: 999-20-2121 |

10. Click Save .

Maintain HR Master Data



HR master data Edit Goto Extras Utilities Settings System Help

Maintain HR Master Data

Personnel no. 2802

Name Ne1s 01eson

EE group 1 Regular State ... Pers.area FA02 DFA

EE subgroup UE Employee Cost Center 383357 DFA

Personal Data Addtl. Employee Data Employment Issues Career Management

Infotype text E...

Actions

Personal Data

Organizational Assignment

Addresses

Basic Pay

Family Member/Dependents

Residence Status

Additional Personal Data

Communication

Period

From To

Today Curr. week

All Curr. month

From curr. date Last week

To Current Date Last month


Current Period Current Year

Choose

Direct selection

Infotype Family Member/Dependents STy

Record created PA30 sapetr INS

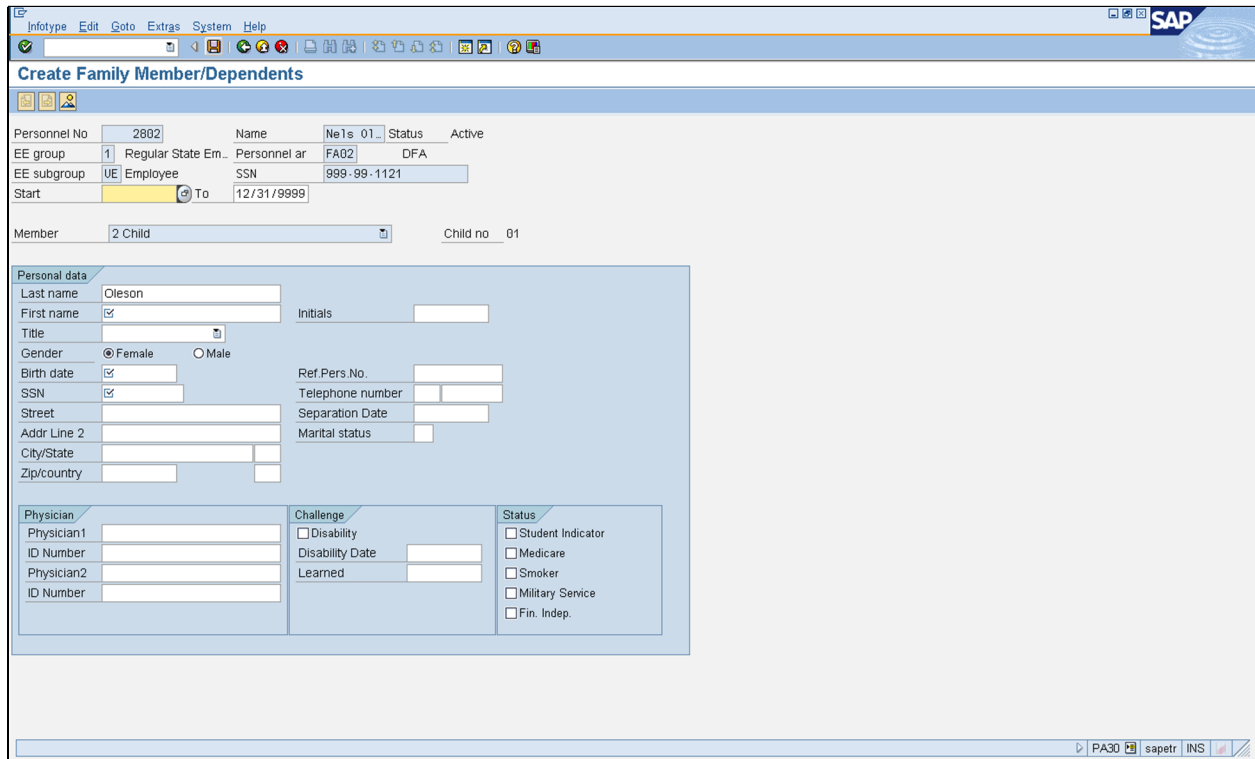
11. Highlight **Family Member/Dependents** and click **Create** .
12. Click type of dependent to be added to the employee's benefits.

Subtypes for infotype "Family Member/Dependents" (1) 17 Entries found

| Subtypes for infotype "Family Member/Dependents" (1) 17 Entries found | |
|---|--------------------------|
| Restrictions | |
| STyp | Name |
| 1 | Spouse |
| 10 | Divorced spouse |
| 11 | Father |
| 12 | Mother |
| 13 | Domestic partner |
| 14 | Domestic partner's child |
| 15 | Newborn |
| 16 | Stepson |
| 17 | Stepdaughter |
| 2 | Child |
| 3 | Court Appointed |
| 4 | Adopted Child |
| 5 | Guardian |
| 6 | Stepchild |
| 7 | Emergency contact |
| 8 | Related persons |
| 9 | Other |

13. Click **Copy** 

Create Family Member/Dependents

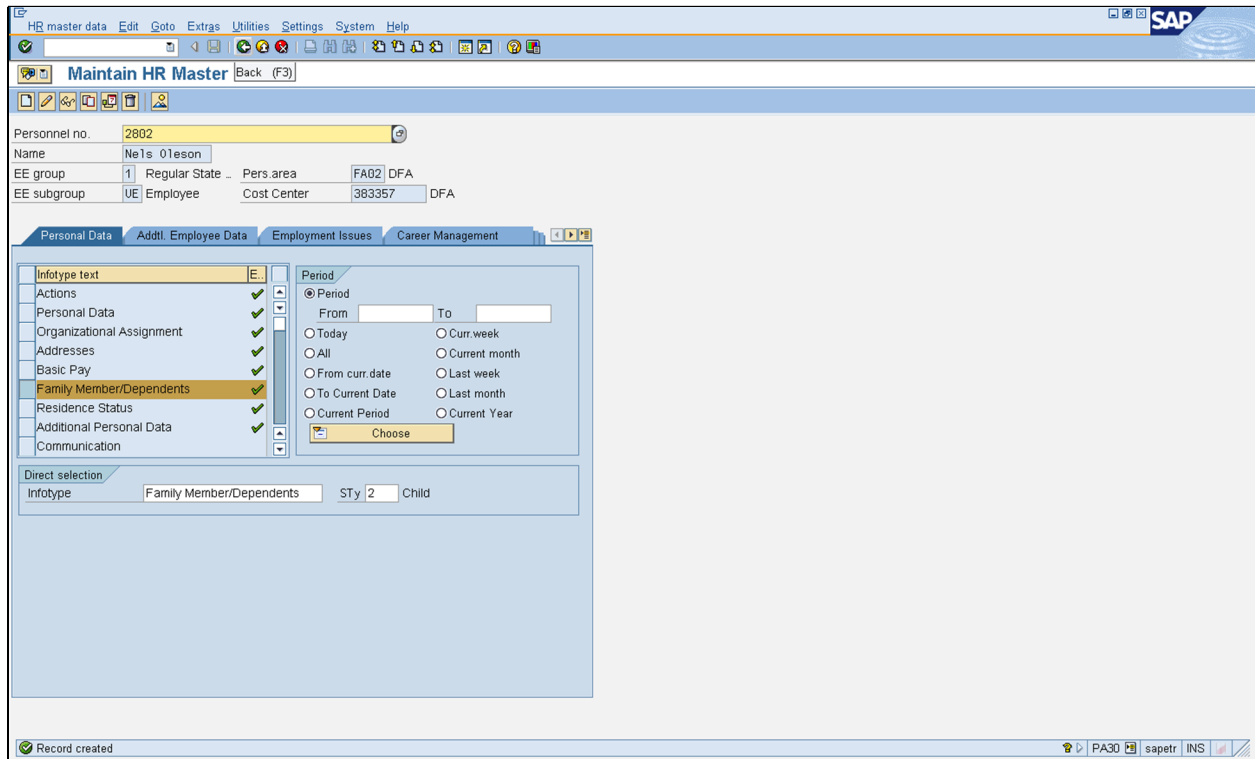


14. As required, complete/review the following fields:

| Field | R/O/C | Description |
|------------|----------|---|
| Start | Required | Enter the 1st of the month in which benefits will be effective. Example: 08/01/2010 |
| First name | Required | Enter the dependent's first name. Note: If the dependent's last name is different from the employee's last name, delete and enter the correct last name. Example: Nellie |
| Birth date | Required | Enter the dependent's date of birth. Example: 06/24/1993 |
| SSN | Required | Enter the dependent's social security number. Example: 897-12-3456 |

15. Click Save .

Maintain HR Master Data



The screenshot shows the SAP 'Maintain HR Master' screen. The top menu bar includes 'HR master data', 'Edit', 'Goto', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. The title bar reads 'Maintain HR Master' with a 'Back (F3)' button. Below the title bar are icons for various functions. The main area displays the following data:

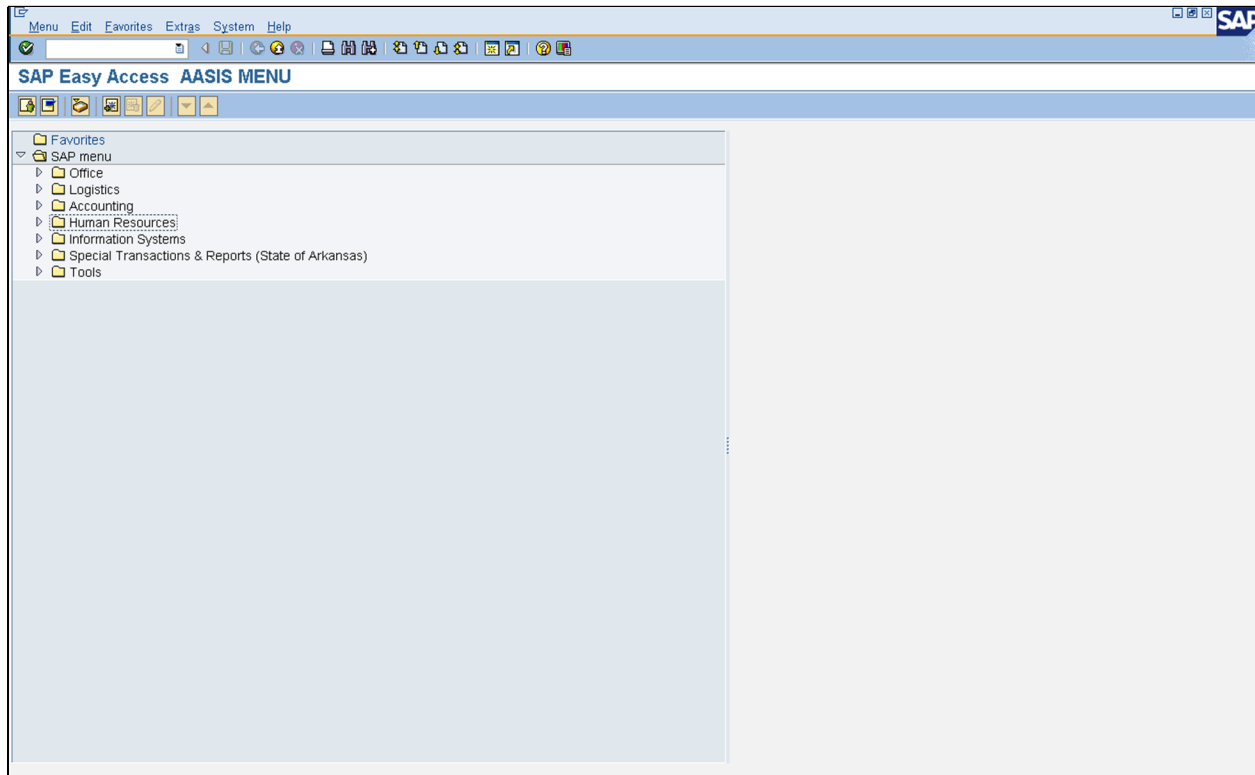
Personnel no. 2802
 Name Ne1s 01eson
 EE group 1 Regular State ... Pers. area FA02 DFA
 EE subgroup UE Employee Cost Center 383357 DFA

Below this is a tabbed interface with 'Personal Data', 'Addtl. Employee Data', 'Employment Issues', and 'Career Management'. The 'Personal Data' tab is active, showing a list of infotypes on the left and a 'Period' selection area on the right. The infotype list includes 'Infotype text', 'Actions', 'Personal Data', 'Organizational Assignment', 'Addresses', 'Basic Pay', 'Family Member/Dependents' (highlighted), 'Residence Status', 'Additional Personal Data', and 'Communication'. The 'Period' section has radio buttons for 'Today', 'All', 'From curr. date', 'To Current Date', 'Current Period', 'Curr. week', 'Current month', 'Last week', 'Last month', and 'Current Year', along with a 'Choose' button. At the bottom, a 'Direct selection' section shows 'Infotype' as 'Family Member/Dependents', 'STy' as '2', and 'Child'.

The status bar at the bottom indicates 'Record created' and shows the user 'PA30 sapetr INS'.

16. Click Back  to continue.

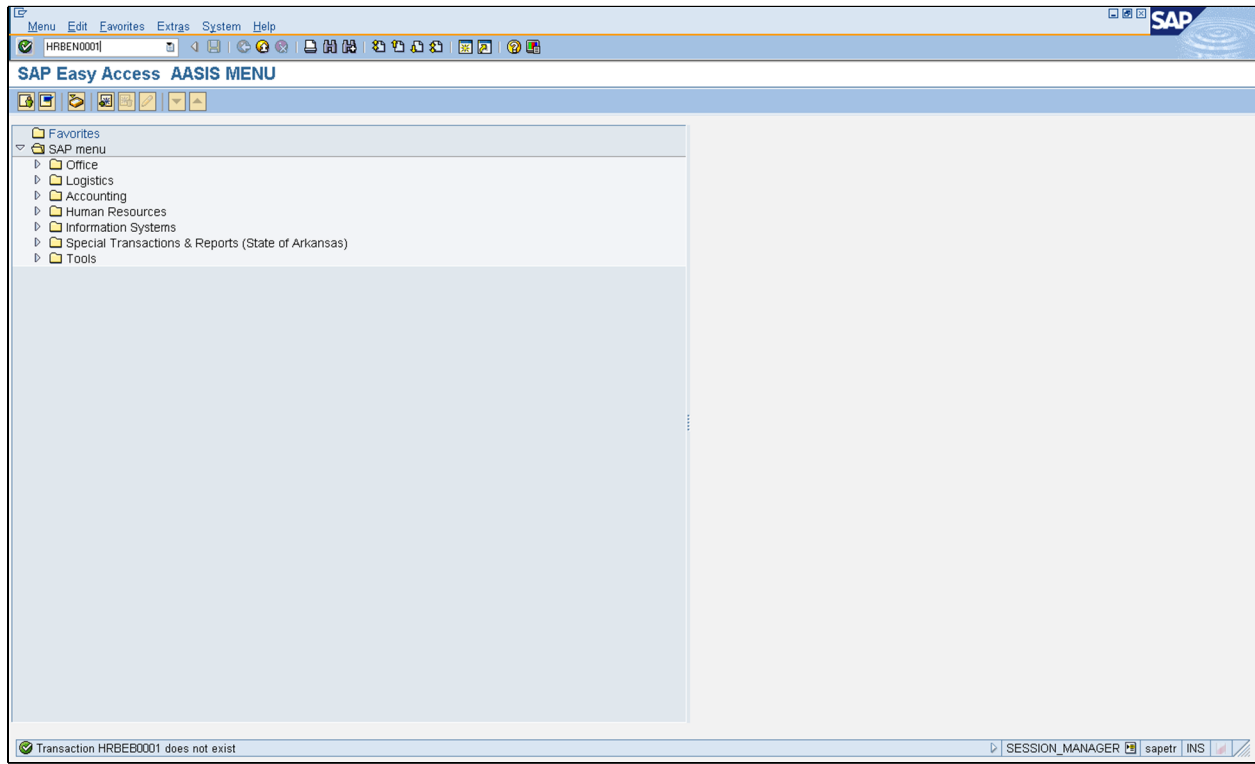
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17. As required, complete/review the following fields:

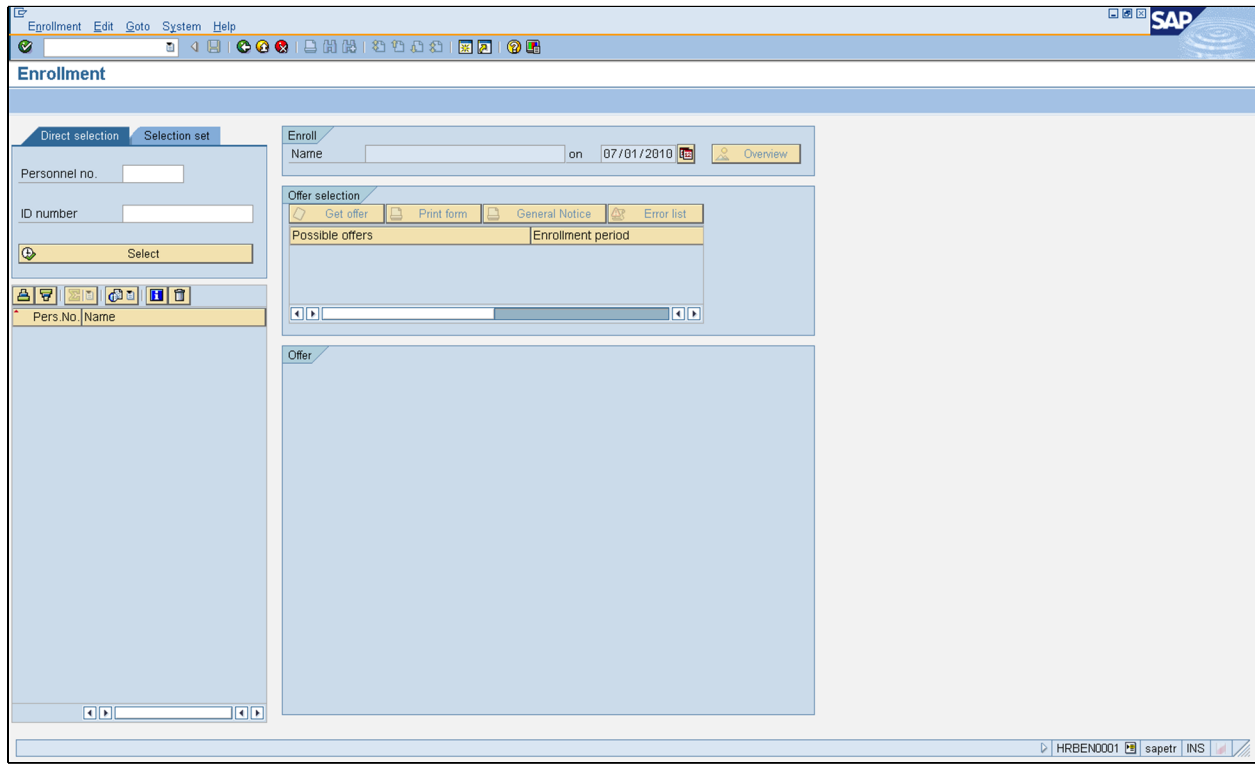
| Field | R/O/C | Description |
|---------------|----------|---|
| Command Field | Required | Enter Enrollment transaction code. Example: HRBEN0001 |

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18. Click **Enter** .

Enrollment



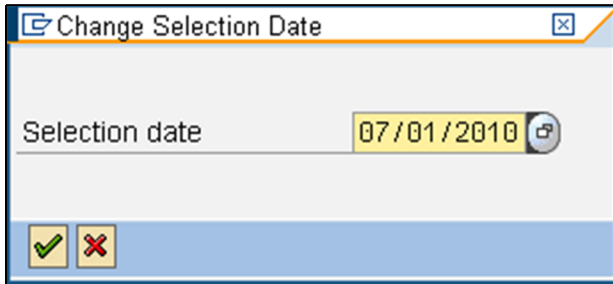
19. As required, complete/review the following fields:

| Field | R/O/C | Description |
|---------------|----------|---|
| Personnel no. | Required | Enter the employee's personnel number. Example: 2802 |

20. Click Enter .

21. Click **Change date** .

Change Selection Date



Change Selection Date

Selection date: 07/01/2010

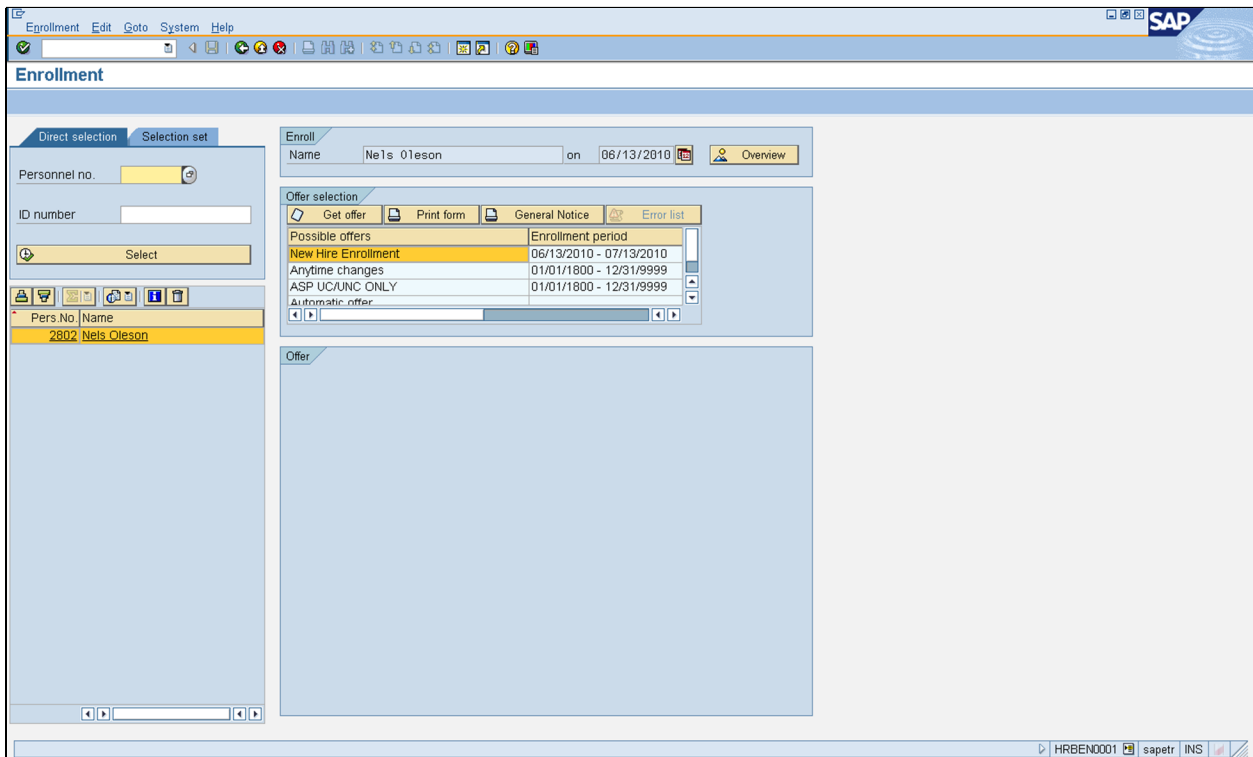
Buttons: [Checkmark] [X]

22. As required, complete/review the following fields:

| Field | R/O/C | Description |
|----------------|----------|--|
| Selection date | Required | Enter the employee's hire date. Example: 06/13/2010 |

23. Click **Continue** .

Enrollment



Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set

Personnel no. []

ID number []

Select

Pers No Name

2802 Nels Oleson

Enroll

Name Nels Oleson on 06/13/2010 Overview

Offer selection

Get offer Print form General Notice Error list

| Possible offers | Enrollment period |
|---------------------|-------------------------|
| New Hire Enrollment | 06/13/2010 - 07/13/2010 |
| Anytime changes | 01/01/1800 - 12/31/9999 |
| ASP UC/UNC ONLY | 01/01/1800 - 12/31/9999 |
| Automatic offer | |

Offer

HRBEN0001 sapetr INS

24. Double-click under *Possible offers* text box **New Hire Enrollment** to select a plan.

Enrollment

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set

Personnel no.

ID number

Select

Pers.No Name

2802 Neils Oleson

Enroll Name Neils Oleson on 06/13/2010 Overview

Offer selection

Get offer Print form General Notice Error list

Possible offers Enrollment period

New Hire Enrollment 06/13/2010 - 07/13/2010

Anytime changes 01/01/1800 - 12/31/9999

ASP UCA/INC ONLY 01/01/1800 - 12/31/9999

Automatic offer

New Hire Enrollment

Enroll Costs Undo selection Error List

| Plan | Status | Validity period | Activity |
|--------------------------------|--------|-------------------------|----------|
| Medical | | | |
| ARHealth-Health Advantage ASE | | 08/01/2010 - 12/31/9999 | |
| ARHealth HD PPO-NovaSys ASE | | 08/01/2010 - 12/31/9999 | |
| ARHealth - NovaSys ASE | | 08/01/2010 - 12/31/9999 | |
| Basic Life | | | |
| MN Basic Life and AD&D ASE | | 08/01/2010 - 12/31/9999 | |
| Dependent Life | | | |
| MN Dependent Life Post Tax | | 08/01/2010 - 12/31/9999 | |
| Opt Life Pretax | | | |
| MN Opt EE Life Pre-Tax ASE | | 08/01/2010 - 12/31/9999 | |
| Opt Life Posttax | | | |
| MN Opt EE Life PostTax ASE/G&F | | 08/01/2010 - 12/31/9999 | |
| 401(a) | | | |
| APERS Cont | | 06/13/2010 - 12/31/9999 | |
| 457 | | | |
| 457 Citistreet | | 06/13/2010 - 12/31/9999 | |
| HDHP HSA | | | |
| Datapath HSA | | 08/01/2010 - 12/31/9999 | |
| Dependent Care | | | |
| Flex Depend. Spending Acct | | 08/01/2010 - 12/31/9999 | |

HRBEN0001 sapetr INS

25. Click the employee's desired health plan.

Maintain Health Plan

Maintain Health Plan

Pers.No. 2802 Nels Oleson
Plan ARHealth - NovaSys ASE
Start 08/01/2010 - 12/31/9999

☐ Stop participation in period

Option

Dependents

Plan options

Health Plan Opt OPT1 Standard ASE 1
Dependent Cover EC1 Emp + Child(ren) 1

Costs USD Monthly

Employee 194.54
Employer 0.00

☒ Deductions Pre-

Accept

26. Click Dependents tab **Dependents**.

Maintain Health Plan

Maintain Health Plan

Pers.No. 2802 Nels Oleson
Plan ARHealth - NovaSys ASE
Start 08/01/2010 - 12/31/9999

☐ Stop participation in period

Option

Dependents

| Select. | Name | Type of dep./ben. |
|--------------------------|----------------|-------------------|
| <input type="checkbox"/> | Harriet Oleson | Spouse |
| <input type="checkbox"/> | Nellie Oleson | Child |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

27. Click to select the 1st dependent. ☐
28. Click to select any additional dependents. ☐
29. Click Option tab

Option

Maintain Health Plan

Maintain Health Plan

Pers.No. 2802 Nels Oleson
Plan ARHealth - NovaSys ASE
Start 08/01/2010 - 12/31/9999

☐ Stop participation in period

Option

Dependents

Plan options

Health Plan Opt OPT1 Standard ASE 1
Dependent Cover EC1 Emp + Child(ren) 1

Costs USD Monthly

Employee 194.54
Employer 0.00

☒ Deductions Pre-

Accept

30. Click Dependent Cover drop-down box.

Maintain Health Plan

Maintain Health Plan

Pers.No. 2802 Nels Oleson

Plan ARHealth - NovaSys ASE

Start 08/01/2010 - 12/31/9999

☐ Stop participation in period

Option

Dependents

Plan options

Health Plan Opt OPT1 Standard ASE 1

Dependent Cover EC1 Emp + Child(ren) 1

EC1 Emp + Child(ren) 1

EE1 Employee Only 1

EF1 Emp + Family 1

ES1 Emp + Spouse 1

Costs USD Monthly

Employee

Employer 0.00

Accept

✖

31. Click the coverage appropriate for the employee's dependent coverage.

32. Click **Accept**  **Accept**.

Enrollment

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set

Personnel no.

ID number

Select

Pers.No Name

2802 Neils Oleson

Enroll Name Neils Oleson on 06/13/2010 Overview

Offer selection

Get offer Print form General Notice Error list

Possible offers Enrollment period

New Hire Enrollment 06/13/2010 - 07/13/2010

Anytime changes 01/01/1800 - 12/31/9999

ASP UCA/UNC ONLY 01/01/1800 - 12/31/9999

Automatic offer

New Hire Enrollment

Enroll Costs Undo selection Error List

| Plan | Status | Validity period | Activity |
|--------------------------------|--------|-------------------------|----------|
| Medical | | | |
| ARHealth-Health Advantage ASE | | 08/01/2010 - 12/31/9999 | |
| ARHealth HD PPO-NovaSys ASE | | 08/01/2010 - 12/31/9999 | |
| ARHealth - NovaSys ASE | | 08/01/2010 - 12/31/9999 | ✓ |
| Basic Life | | | |
| MN Basic Life and AD&D ASE | | 08/01/2010 - 12/31/9999 | |
| Dependent Life | | | |
| MN Dependent Life Post Tax | | 08/01/2010 - 12/31/9999 | |
| Opt Life Pretax | | | |
| MN Opt EE Life Pre-Tax ASE | | 08/01/2010 - 12/31/9999 | |
| Opt Life Posttax | | | |
| MN Opt EE Life PostTax ASE/G&F | | 08/01/2010 - 12/31/9999 | |
| 401(a) | | | |
| APERS Cont | ■ | 06/13/2010 - 12/31/9999 | |
| 457 | | | |
| 457 Citistreet | | 06/13/2010 - 12/31/9999 | |
| HDHP HSA | | | |
| Datapath HSA | | 08/01/2010 - 12/31/9999 | |
| Dependent Care | | | |
| Flex Depend. Spending Acct | | 08/01/2010 - 12/31/9999 | |

HRBEN0001 sapetr INS

33. Click the employee's additional desired benefit plans for which the dependents are to be added.

Maintain Insurance Plan

Maintain Insurance Plan

Pers.No.

2802

Nels Oleson

Plan

MN Basic Life and AD&D

ASE

Start

08/01/2010

-

12/31/9999

☐ Stop participation in period

Coverage

Insurance option and coverage

Insurance Optio

BL01 Basic EE Life Coverage

Basic Coverage

10,000.00

USD

Additional Unit

0 X

0.00

USD

Insurance Cover

10,000.00

USD

Costs USD Monthly

EE post-tax

0.00

Employer

0.00

Accept

✖

34. Click **Accept**  **Accept**.

Enrollment

Enrollment Edit Goto System Help

Enrollment

Direct selection Selection set

Personnel no.

ID number

Select

Pers.No Name
2802 Neils Oleson

Enroll Name Neils Oleson on 06/13/2010 Overview

Offer selection
Get offer Print form General Notice Error list

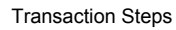
Possible offers Enrollment period
New Hire Enrollment 06/13/2010 - 07/13/2010
Anytime changes 01/01/1800 - 12/31/9999
ASP UCA/INC ONLY 01/01/1800 - 12/31/9999
Automatic offer

New Hire Enrollment
Enroll Costs Undo selection Error List


| Plan | Status | Validity period | Activity |
|--------------------------------|--------|-------------------------|----------|
| Execute enrollment | | | |
| ARHealth-Health Advantage ASE | | 08/01/2010 - 12/31/9999 | |
| ARHealth HD PPO-NovaSys ASE | | 08/01/2010 - 12/31/9999 | |
| ARHealth - NovaSys ASE | | 08/01/2010 - 12/31/9999 | ✓ |
| Basic Life | | | |
| MN Basic Life and AD&D ASE | | 08/01/2010 - 12/31/9999 | ✓ |
| Dependent Life | | | |
| MN Dependent Life Post Tax | | 08/01/2010 - 12/31/9999 | |
| Opt Life PreTax | | | |
| MN Opt EE Life Pre-Tax ASE | | 08/01/2010 - 12/31/9999 | |
| Opt Life Posttax | | | |
| MN Opt EE Life PostTax ASE/G&F | | 08/01/2010 - 12/31/9999 | |
| 401(a) | | | |
| APERS Cont | ■ | 06/13/2010 - 12/31/9999 | |
| 457 | | | |
| 457 Citistreet | | 06/13/2010 - 12/31/9999 | |
| HDHP HSA | | | |
| Datapath HSA | | 08/01/2010 - 12/31/9999 | |
| Dependent Care | | | |
| Flex Depend. Spending Acct | | 08/01/2010 - 12/31/9999 | |

HRBEN0001 sapetr INS

35. Click **Enroll**  **Enroll**.





- 37.** Select **Confirmation** to print a copy of the employee's elected benefits. Click **Continue**  to complete the process.



Next Steps

Employees should receive a copy of their Confirmation letter within 30 days of enrollment to ensure all plans are correct.

To print a Confirmation letter displaying the employee's catch-up amounts for health and/or life plans, go to transaction **HRBEN0015**.



Summary

You have successfully completed a New Hire with dependents.